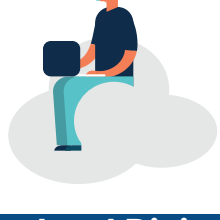


IT Service Providers: INVESTMENT TRENDS IN EUROPE



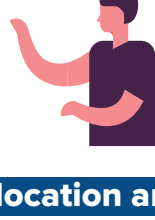
WHAT ARE SERVICE PROVIDERS?

Any business that generates some portion of its revenue from the delivery of a provisioned ICT-based resource via a pay-as-you-use, on-demand, or subscription model



Cloud and Digital Services Providers

Companies delivering compute/storage/network resources, or cloud software services, or digital resources including a "self-service" element



Colocation and Managed Services Providers

Companies offering colocation facilities and related datacenter management systems or taking over the 24 x 7 operations of an IT or business process environment



Communications Services Providers

Companies offering communications services (transport of voice, internet access, television programs) over telephone network, IP network, and satellite

SERVICE PROVIDERS' ICT SPENDING IN EUROPE

ICT spending by service providers in Europe by 2022

\$81 billion CAGR **4%**



Western Europe

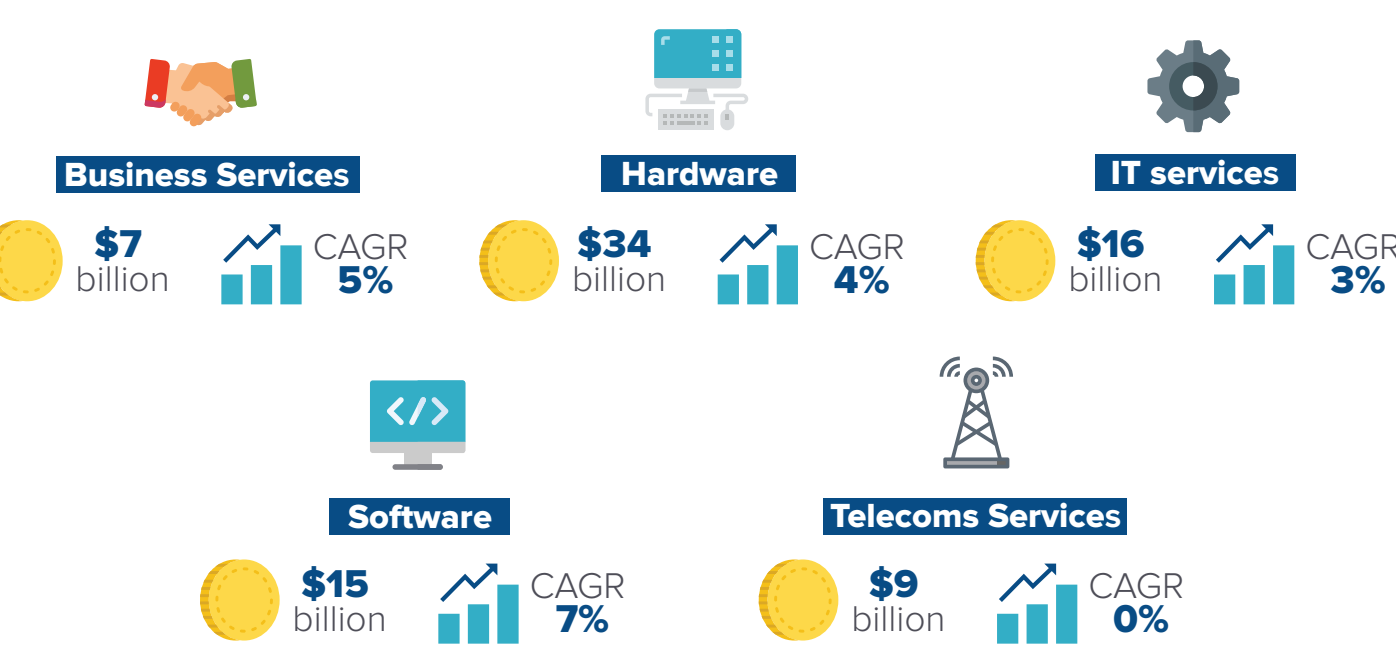
\$65 billion CAGR **3%**

Central and Eastern Europe

\$16 billion CAGR **5%**

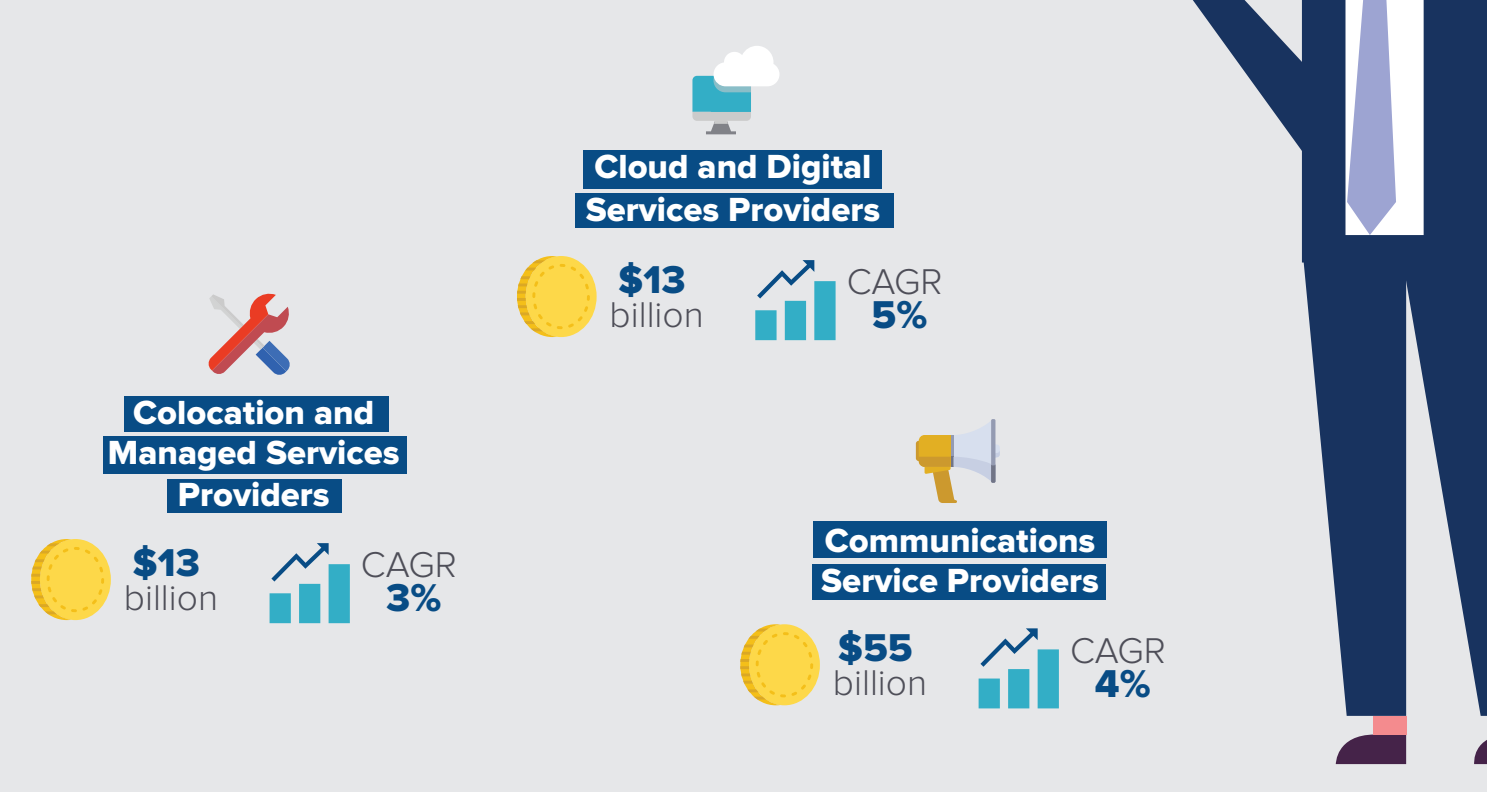
SOFTWARE IS THE FASTEST-GROWING INVESTMENT AREA

Service providers' ICT spending by investment area by 2022



CLOUD AND DIGITAL SERVICE PROVIDERS DRIVING ICT SPENDING GROWTH

Service providers' ICT spending by segment by 2022

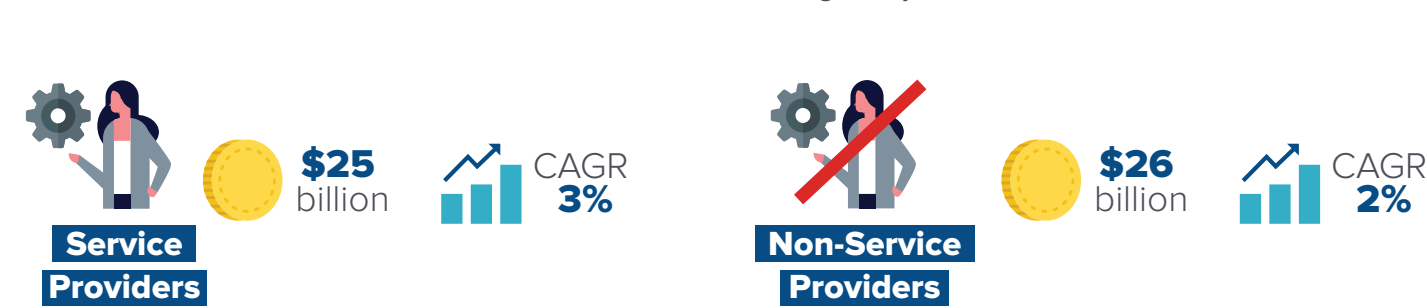


GROWING INTEREST OF SERVICE PROVIDERS IN CORE INFRASTRUCTURE TECHNOLOGIES

Core infrastructure technologies

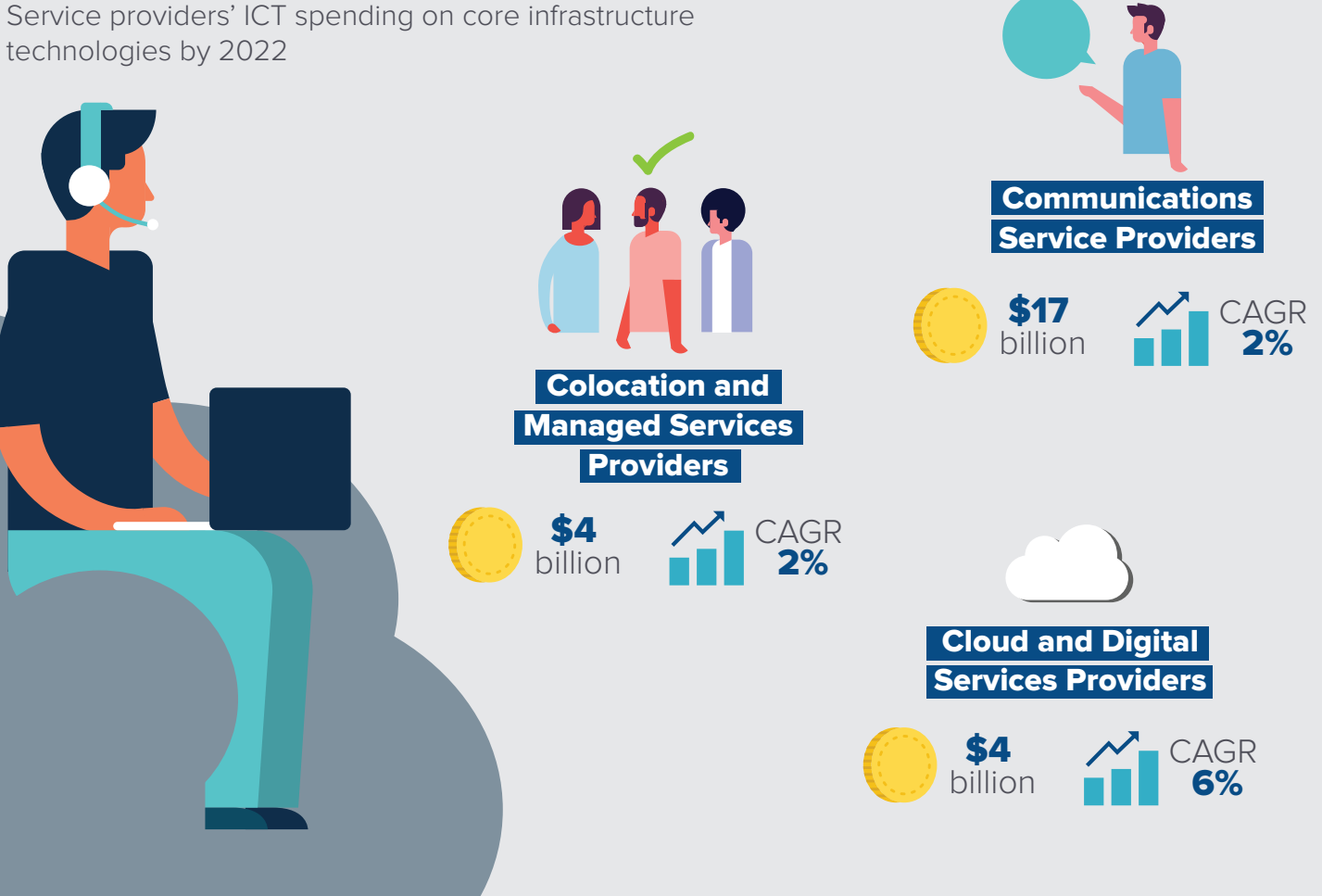


Service Providers will almost equal non-service providers in spending on core infrastructure technologies by 2022



CLOUD AND DIGITAL SERVICE PROVIDERS DRIVING THE SHIFT TO THE "AS-A-SERVICE" MODEL IN CORE INFRASTRUCTURE TECHNOLOGY MARKETS

Service providers' ICT spending on core infrastructure technologies by 2022



Source: IDC Worldwide Black Book Service Provider Edition

Where to get more information:

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